DIGITAL PRESERVATION MODELS & POLICY

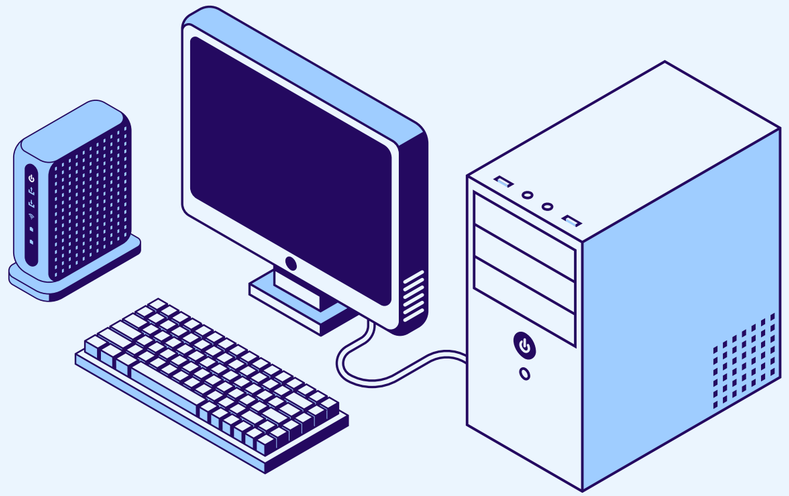
Digital Preservation Training Webinar #1

March 31, 2026 | 12:00PM (PT)

CALIFORNIA REVEALED

GROUNDWORK GRANTS

California Cultural Heritage Disaster Preparedness Project

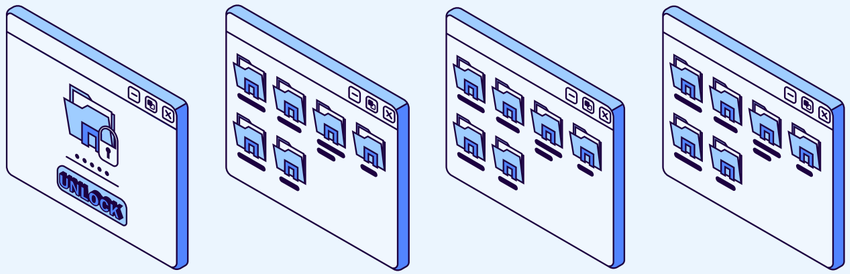


THANK YOU RECOLLECTION WISCONSIN

This series is based on curriculum developed by Recollection Wisconsin, who partnered with UW-Madison and UW-Milwaukee to provide library school students with practical experience in digital stewardship and increase the capacity of small libraries and cultural heritage organizations to curate their digital collections.

Curating Community Digital Collections (CCDC) program and curriculum materials are licensed under CC BY-NC 4.0.
Recollection Wisconsin welcomes the use of these materials to develop your own digital preservation program.

SERIES AGENDA



1 **TODAY**
Digital Preservation Models & Policy

2 **Tuesday, April 14**
Prepare for Digitization: Identifying, Assessing & Prioritizing

3 **Tuesday April 28**
Digital Storage 101

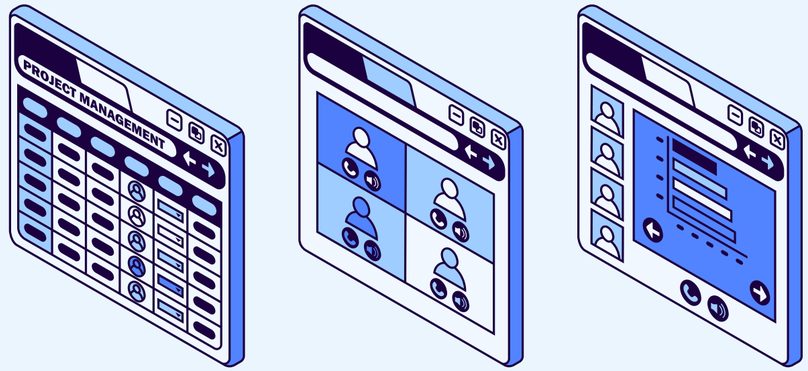
4 **Tuesay May 5**
Digital Collection Development, Outreach & Programming

WEBINAR #1 AGENDA

Here are the topics we will cover this afternoon:

- Foundations: key definitions and models
- Applying the model: policy & procedures
- Next steps: digital preservation policy worksheet

12:00PM to 1:00PM: Presentation
1:00PM to 1:30PM: Questions, comments, show & tell...



Key Definitions:
Digital readiness

Having the knowledge, tools, resources and infrastructure to provide online public access to archives and historical records. The ability to preserve obsolete audiovisual formats and provide long-term storage of digital records.

Recollection Wisconsin, Digital Toolkit (2023)

Key Definitions: Preservation

Preservation is the protection of cultural property through activities that minimize chemical and physical deterioration and damage and that prevent loss of informational content. The primary goal of preservation is to prolong the existence of cultural property.

Northeast Document Conservation Center - What is Preservation?

Key Definitions: Digital Preservation

Combines policies, strategies and actions to ensure access to digital materials over time, regardless of the challenges of media failure and technological change.

Working group on Defining Digital Preservation ALA Annual Conference (2008)

Key Definitions: Digital Stewardship

Management of digital objects throughout their life cycle to facilitate long-term preservation and use which may include selection, acquisition, conversion, documenting context, recontextualization and discoverability.

Dictionary of Archives Terminology, Society of American Archivists (2026) and adapted from The Signal, Library of Congress (2011)

Girl in Mariachi dance (1980)
National City Public Library

Digital Preservation is not all or nothing

- Digital preservation means making the best use of available resources to alleviate the most pressing preservation risks.

- Remember: “The perfect is the enemy of the good.”

Adapted from Trevor Owens, User Centered Digital Memory (June 2017)

Digitization ≠ preservation

“The goal should be that one feeds into the other. Scanning should be a first step in a longer process, and, as with many journeys, the first step can make all the difference.”

Adapted from Trevor Owens, User Centered Digital Memory (June 2017)

Group of Young Children Performing Dance on Stage with Streamers (1980)
Visual Communications Archives

Organizations - and you - make preservation possible

- Libraries, archives, museums, and cultural heritage organizations are the primary facilitators of long-term preservation.
- The possibility and success of preservation is enabled through skills development and training, dedicated resources, and development of and adherence to short- and long-term goals.
- There’s no single tool or piece of software that “does” digital preservation.

Adapted from Trevor Owens, User Centered Digital Memory (June 2017)

Saint Vincent's School - May Day (1956)
St. Vincent's

Nothing has been preserved, there is something being preserved.

- Digital preservation is not "once and for all." It's ongoing work. Each digital preservation project builds off the last and informs the next effort.

- Decisions about digital preservation can be made in a continuum of short-term commitments (*e.g. 5 years + 5 years + 5 years...*)

Adapted from Trevor Owens, User Centered Digital Memory (June 2017)

WHAT CAN WE DO?

1. Digital Preservation policy
   - Document your decisions
   - Plan for the future

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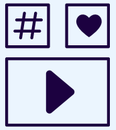
2. Digital Collections Inventory
   - Identify what you have
   - Prioritize what you need to keep



3. File/folder management scheme
   - Get organized - get the (digital) boxes off the (digital) floor

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4. Research and make recommendations for 3-2-1 storage solutions
   - Store more than one copy of your files
   - Integrity check your data

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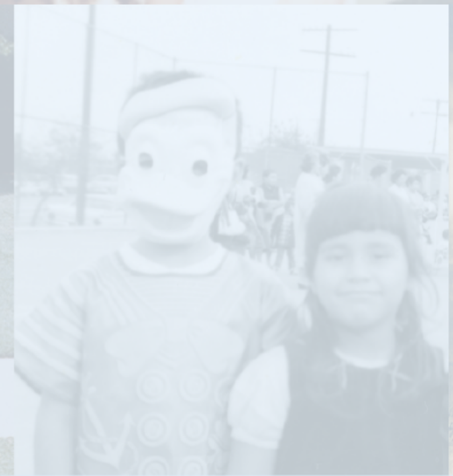
5. Connect with communities of practice for ongoing support
   - You don’t have to go it alone!

WHAT ARE THE THINGS YOU'RE PRESERVING? WHY?

Consider the physical and/or digital collections in your care.
What motivates you to be a collections steward?
Follow the link in the chat or click on the QR code to respond...



WHO IS PART OF YOUR COMMUNITY OF PRACTICE?

The Kef Time Jrs. Band (Hye Class Band): Jim Karagozian (kanun); Harold Hagopian (clarinet); Jimmy Zerounian (bass) (1980/1981) Armenian Studies Department, California State University, Fresno

Who are your stakeholders?

Connect (often) with each other for ongoing support.

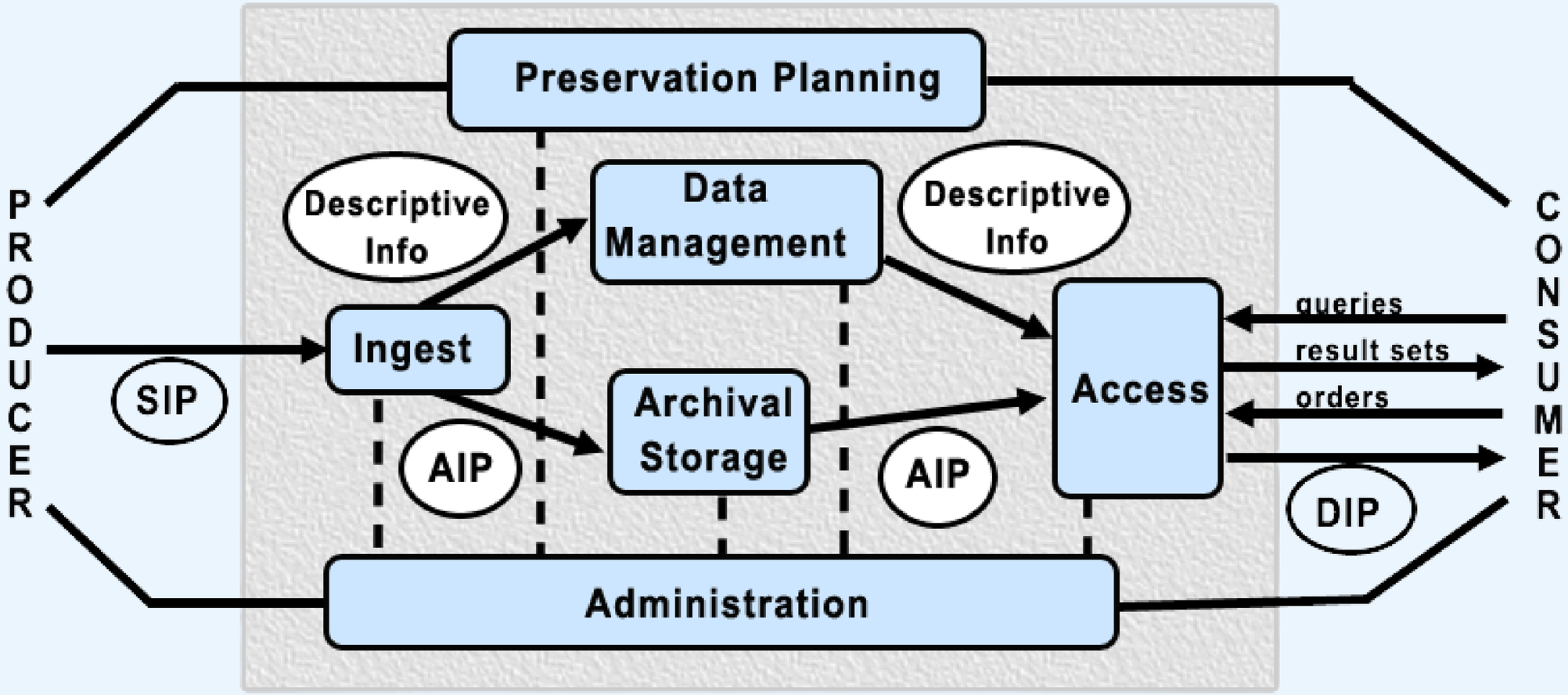
Share motivations.

Share best/bestish practices.

Share models and policies.

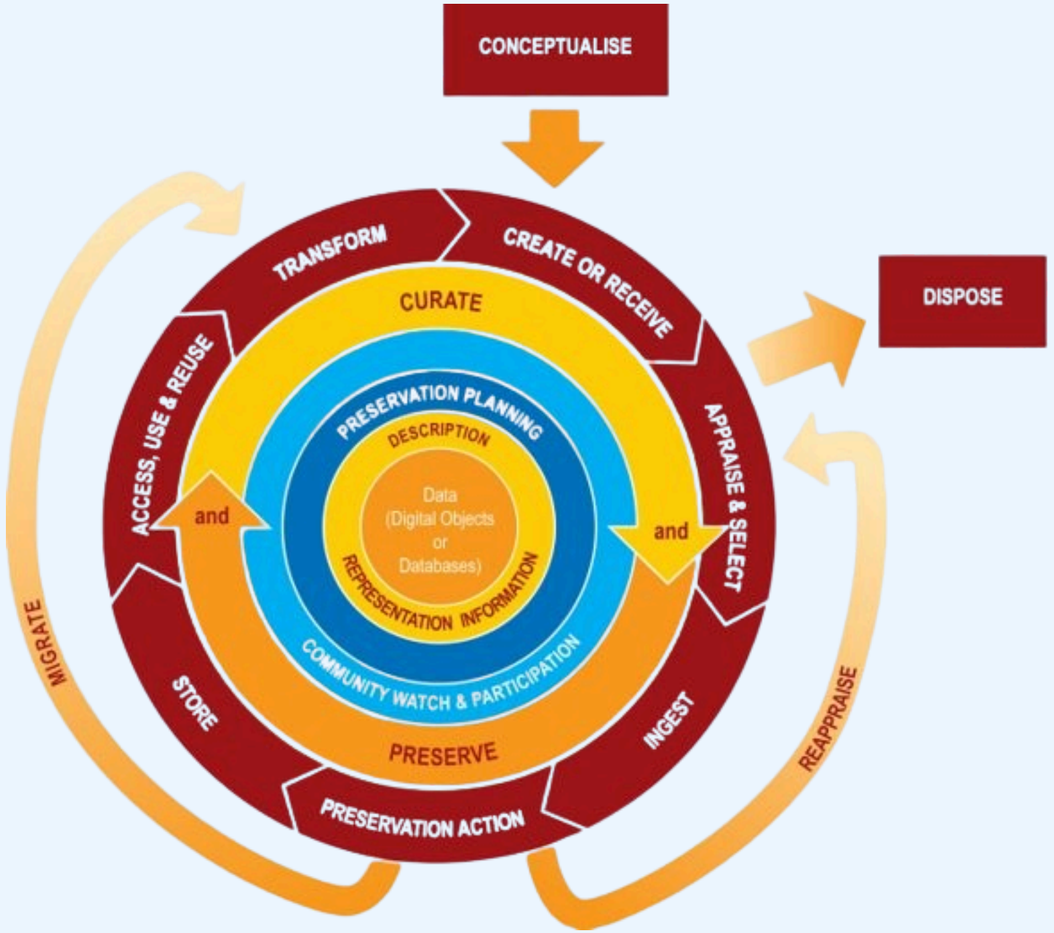
Share storage solutions.

Theoretical Framework:
Open Archival Information System (OAIS)



Consultative Committee for Space Data Systems, Reference Model for an OAIS (2024)

Life Cycles:
Digital Curation & Digital Stewardship



Sarah Higgins, Digital Curation Lifecycle Model (2008)

Sustainable Heritage Network, Digital Stewardship Lifecycle Model (2020)

The To-do List:
Recollection Wisconsin
Digital Readiness Toolkit: Digital Readiness Levels

- *Plan and Prioritize*
- *Obtain Permissions*
- *Digitize*
- *Describe*
- *Share*
- *Store and Maintain*
- *Evaluate*

Digital Readiness Levels

The Digital Readiness Levels are a structured roadmap for public history organizations to plan and sustainably grow their digital initiatives in order to improve access to collections.

Focus Area	Bronze	Silver	Gold
	Laying a strong foundation	*Putting it into practice*	*Refining and sustaining*
Plan and Prioritize	Set goals for digital work that fit the organization's mission and policies. Adopt a digital mission statement or revise existing mission statement to include digital work.	Identify and prioritize potential digital projects. Make a digital project plan that includes roles, activities, required resources and partners.	Adopt a digital collection development policy or revise existing policy to include digitized and born digital content.
Obtain Permissions	Create and use permission forms and donor agreements that include specific language for the use of digitized and born digital content or modify existing forms.	Evaluate copyright status of content. Identify items with access restrictions or concerns, including privacy, ethical, or cultural considerations.	Assign standardized rights statements or Creative Commons licenses for collection items. Adopt a takedown policy and, if applicable, a statement on harmful content.
Digitize	Determine standards and procedures to be used to digitize physical materials or process born digital content.	Using identified standards, undertake digitization or born-digital processing work either in-house or with an appropriate vendor or partner.	Use a quality control checklist to review content and confirm it meets identified standards.
Describe	Adopt a consistent naming convention for digital files. Determine standards to be used to describe digital content.	Using identified standards, create basic descriptive metadata for terms.	Develop a data dictionary and use controlled vocabularies to standardize metadata.
Share	Review goals and options for providing access to content. Choose an access platform or system that meets identified needs.	Make items and associated descriptive information available for discovery and repurposing.	Implement techniques to support accessibility of online content, including alt text, transcripts, and other best practices.
Store and Maintain	Create and maintain a collection-level inventory of digital content.	Store at least two, preferably three, copies of each primary file and related metadata, with one copy stored off-site. Check and refresh storage media on a regular schedule.	Plan for future storage needs. Use software tools to check file integrity.
Evaluate	Identify primary users and ways to engage them with digital content.	Collect data and stories about how digital content is stored.	Use collected data and stories to inform future collection development, outreach, and programming. Share knowledge with other practitioners to build community around digital work.

Recollection Wisconsin Digital Readiness Toolkit (2023)

HOW DO WE MAKE THE MODEL WORK?

Create a digital preservation policy.

PROCEDURE
POLICY

WHY DO WE NEED POLICY?

Your organization’s practices, values and/or goals

Keep it simple!

Guides decisions and work.

Best practices are not enough…

Justification for decisions

Stay on track!

Accountability, sustainability & continuity

WHO NEEDS YOUR POLICY?

INTERNAL

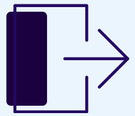
Staff

Volunteers

Administration

Leadership

EXTERNAL


Donors ($$ and collections)

Patrons & Researchers

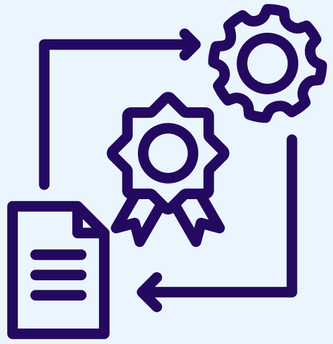
Community Members

Funding Agencies

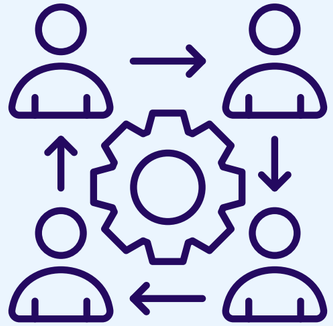
Aiko Yamashita dressed as a cheerleader (1952/1953)
Tulare County Library

POLICY & ADVOCACY

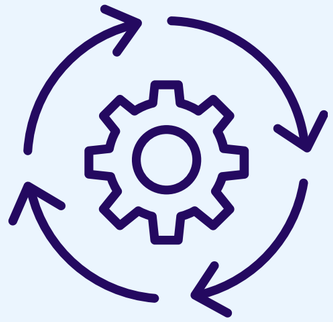
- Trust and credibility
- Supports decision-making on all levels
- Improves administrative or leadership understanding
- Community awareness of collections work
- Outreach to potential donors (collections and $$)



A digital preservation policy or plan is not just one document –



- it could and should be a combination of best practices
and workflows and goals that evolves over time -



- as your collections grow and technology changes -

HOW DO YOU BEGIN?

Creating a digital preservation policy: Remember your organization's motivations

1

WHY is there a need for digital preservation at your organization?

- Need and responsibility.
- A general statement that ties to your mission.

2

WHAT digital materials will you preserve long-term?

- Scope, types of content and formats.
- Dust off your collection development policy.
- Include exclusions – what will NOT be preserved.
- What ways will files be accepted?

3

WHO will be responsible for long term digital preservation at your organization?

- Define who will be involved in digital preservation work and at what stage(s) in any process.
- Multiple departments?
- Volunteer staff?
- IT Staff?
- Community members?
- Roles and job titles, NOT names.
- Aspirational

Sustainable Heritage Network, Developing a Digital Preservation Policy (2018)

Creating a digital preservation policy: Gather standards and best practices

4

WHAT standards and specifications do you follow?

- Define all standards and best practices.
- Include file types, metadata schemas, etc.
- Document preservation metadata, e.g. spreadsheets, etc.
- Research and update standards.

5

HOW do you ensure long term storage?

- Define specific objectives for storage.
- Storage media
- Replacing media
- Multiple backups, redundancy
- Justification for storage
- 3-2-1 plan

6

HOW to ensure continued INTEGRITY?

- Fixity (aka the property of a digital file being fixed, or unchanged)
- What processes and tools, what timeframe?
- Security
- Who has access and what permissions - edit, move, delete, etc.?
- Security
- How enforced? Which policies or actions?
- Technology
- What tools? How and how often used?

Creating a digital preservation policy: Gather resources

7

HOW to ensure continued ACCESS?

- Access objectives and strategies
- Metadata – how do/will you describe digital materials?
- What standards?
- What files types or formats?
- How/when do you migrate or convert?
- How to inform donors - files types donations?
- Versioning?

8

WHAT financial resources do you anticipate for this work?

- Funding stream?
- Infrastructure
- Hardware and software
- Staff/expertise
- Storage

9

HOW does digital preservation fit within your disaster plan?

- Response to disasters that impact digital storage.
- Brainstorm what disasters.
- Consider precautions to ensure file protection.
- How to check data loss/file integrity AFTER a disaster.
- Lost data – how to recover from back ups?
- System in place?

Creating a digital preservation policy: Stay current

10

HOW will you stay current?

- Continuing education goals and strategies.
- “Big picture” issues but also software, tools and technology.
- Special training?
- Funding for conferences or workshops?

11

HOW and WHEN to review and update policy?

- Funding stream?
- Infrastructure
- Hardware and software
- Staff/expertise
- Storage

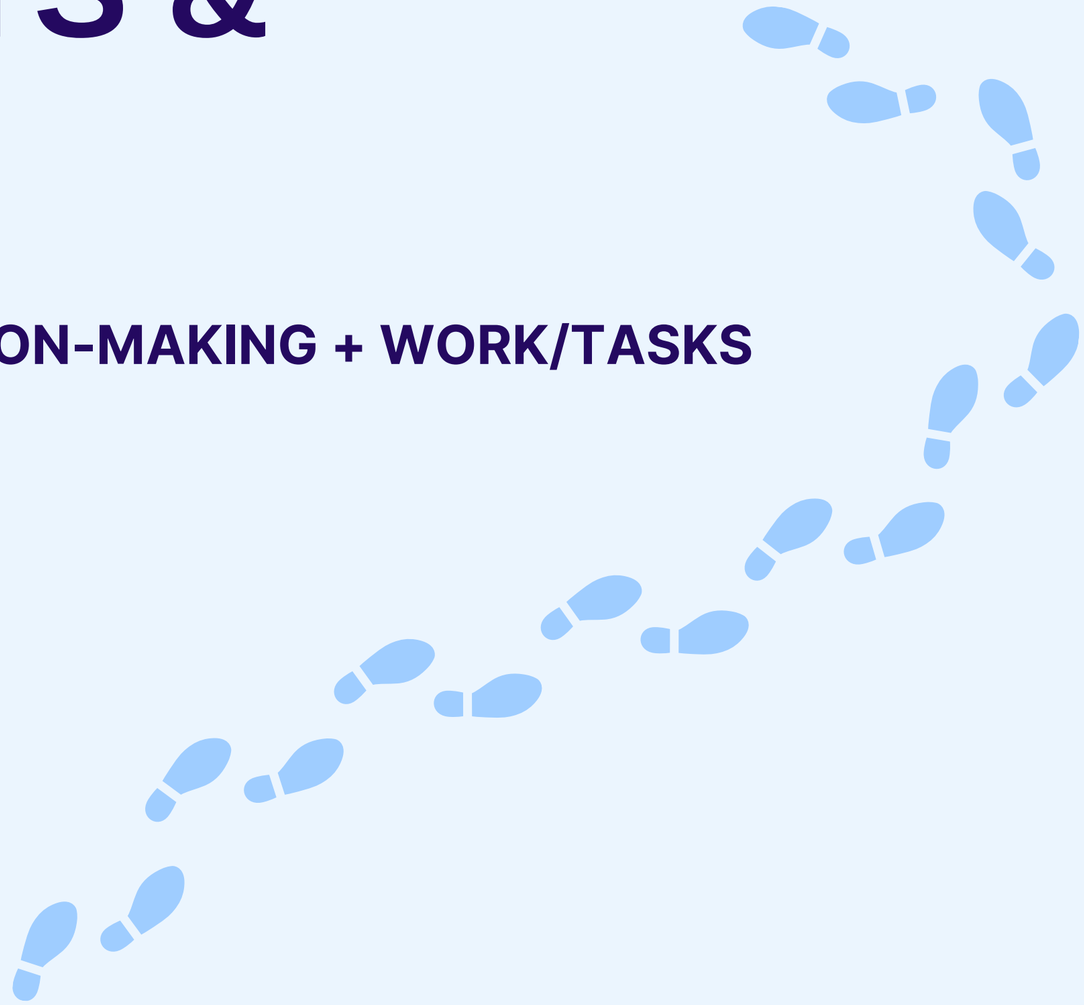
CELEBRATE!

You may not have all the answers to these questions right away that’s okay.

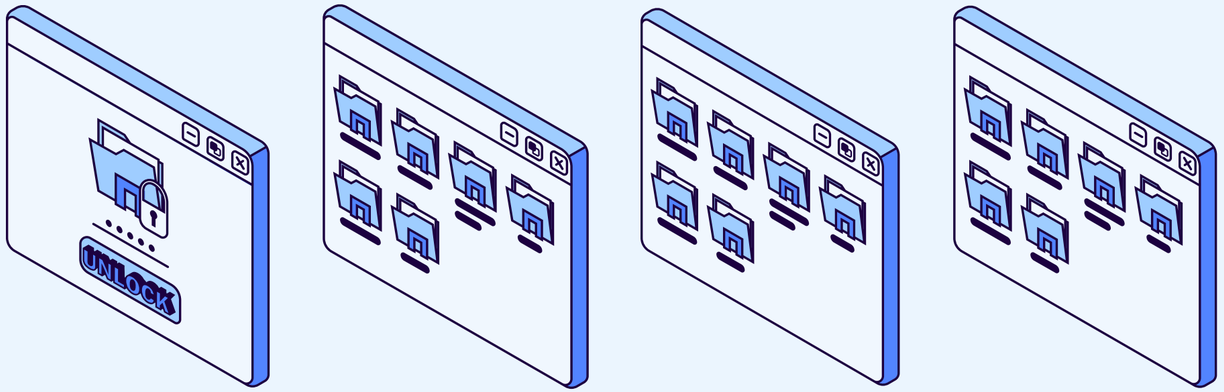
- Use this as a framework to start the conversation and process, and evolve your policy over time.

FINAL THOUGHTS & NEXT STEPS

- Relationship between…**POLICY + DECISION-MAKING + WORK/TASKS**
- Collaborative process(es)
- (More) Technology is not the answer.
- It’s an ongoing, evolving lifecycle.
- Write it down!



Next Webinar: Tuesday, April 14 12PM (PT)
Prepare for Digitization: Identifying, Assessing, & Prioritizing

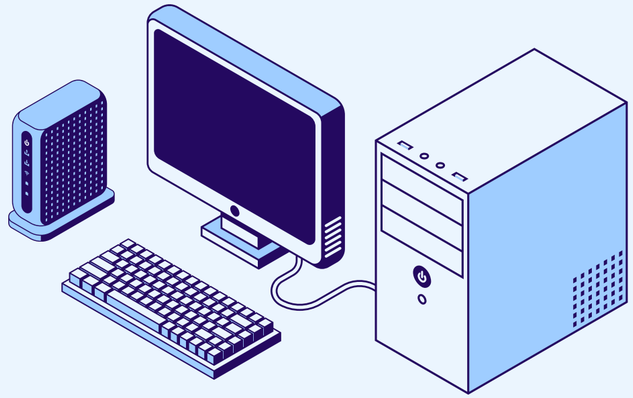


National City Library (1973)
National City Public Library

KEEP IN TOUCH!

team@californiarevealed.org

RESOURCES



Digital Preservation Training Shared Folder: Includes webinar slides and resources

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Digital Preservation Policy Worksheet: Create your policy!

Sustainable Heritage Network (SHN): Managed by the Center for Digital Scholarship and Curation Resources, SHN is a collaborative project that complements the work of Indigenous peoples globally to preserve, share and manage cultural heritage and knowledge.

Recollection Wisconsin - Digital Toolkit: Equips public history practitioners — particularly those doing public history work in small, rural, or underrepresented communities, with few or no paid stal — with the foundational knowledge needed to support digital readiness in their organizations.

Digital Preservation Outreach and Education Network: DPOE-N offers professional development funding, trainings, workshops, resources, and testimonials related to digital preservation and digital stewardship.